



# STIC EIC 3600

## Search Request Form

Today's Date:

4/23/04

Priority Date:

JAN. 2000

For 705 Searches list subclass.

PLS. Call 36

Your Name Sieg Chencinski

AU 3628 Examiner # 79531

Room # 7D 25 Phone 305-6199

Serial # 09/541,197

Is this a Rush? YES NO

SPE's Signature

Is this a first action amendment? YES NO

Is this a refocus? YES NO

Access # 130505

What is the focus of this search? Please include concepts, synonyms etc.

Attach a copy of the abstract, pertinent claims and your East search strategy. Thanks.

- (A) CONVERSION of an investment portfolio  
in stocks/bonds, bonds etc. into an annuity  
program for retirement.  
(B) OPTIMUM FEATURES  
The conversion period has flexibility  
for a period of years.  
- Payments to the owner can be made in a  
combined payment from both portfolios until  
the original portfolio has been reduced to zero.  
- Various features can be adjusted during the life  
of the contract.

STIC Searcher  
Date picked upPhone  
Date completed

File 16:Gale Group PROMT(R) 1990-2004/Aug 24  
     (c) 2004 The Gale Group  
 File 148:Gale Group Trade & Industry DB 1976-2004/Aug 24  
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 File 621:Gale Group New Prod.Annou.(R) 1985-2004/Aug 24  
     (c) 2004 The Gale Group  
 File 636:Gale Group Newsletter DB(TM) 1987-2004/Aug 24  
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 File 9:Business & Industry(R) Jul/1994-2004/Aug 23  
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 File 15:ABI/Inform(R) 1971-2004/Aug 24  
     (c) 2004 ProQuest Info&Learning  
 File 20:Dialog Global Reporter 1997-2004/Aug 24  
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 File 95:TEME-Technology & Management 1989-2004/Jun W1  
     (c) 2004 FIZ TECHNIK  
 File 476:Financial Times Fulltext 1982-2004/Aug 24  
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 File 610:Business Wire 1999-2004/Aug 24  
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 File 613:PR Newswire 1999-2004/Aug 24  
     (c) 2004 PR Newswire Association Inc  
 File 624:McGraw-Hill Publications 1985-2004/Aug 23  
     (c) 2004 McGraw-Hill Co. Inc  
 File 634:San Jose Mercury Jun 1985-2004/Aug 23  
     (c) 2004 San Jose Mercury News  
 File 810:Business Wire 1986-1999/Feb 28  
     (c) 1999 Business Wire  
 File 813:PR Newswire 1987-1999/Apr 30  
     (c) 1999 PR Newswire Association Inc  
 File 625:American Banker Publications 1981-2004/Aug 24  
     (c) 2004 American Banker  
 File 268:Banking Info Source 1981-2004/Aug W2  
     (c) 2004 ProQuest Info&Learning  
 File 626:Bond Buyer Full Text 1981-2004/Aug 24  
     (c) 2004 Bond Buyer  
 File 267:Finance & Banking Newsletters 2004/Aug 23  
     (c) 2004 The Dialog Corp.

Set	Items	Description
S1	186760	(BENEFIT OR BENEFITS OR ASSET OR ASSETS OR INVESTMENT?) (5N- ) (CONVERT? OR CONVERSION? OR TRANSFER?)
S2	435385	(PORTFOLIO? OR STOCK OR STOCKS OR EQUITY OR EQUITIES OR BO- ND OR BONDS) (5N) (CONVERT? OR CONVERSION? OR TRANSFER?)
S3	84317	(PORTION OR PORTIONS OR PART OR PARTS) (5N) (CONVERT? OR CON- VERSION? OR TRANSFER?)
S4	13389	(RETIREMENT? OR GUARANTEE? OR PAYOUT?) () (ANNUITY OR ANNUIT- IES) OR MONETARY()BENEFIT?
S5	30956	(CONVERT? OR CONVERSION? OR TRANSFER?) (5N) (PERIOD OR PERIO- DS OR INTERVAL OR INTERVALS)
S6	138003	(SELECT? OR SPECIF? OR IDENTIF? OR USE) (5N) (PERIOD OR PERI- ODS OR INTERVAL OR INTERVALS)
S7	108472	GOLDEN()RETIREMENT()RESOURCE? OR EQUITABLE()LIFE? OR AXA? - OR HARTFORD()LIFE? OR ALLIANCE()BERNSTEIN?
S8	125	AU=(GOLDEN, J? OR GOLDEN J?)
S9	663425	S1 OR S2 OR S3
S10	110	S9(S)S4

S11 1 S10(S) (S5 OR S6)  
S12 31 (S1 OR S2) (5N) S4  
S13 0 S12(S) (S5 OR S6)  
S14 30 S12 NOT S11  
S15 22 S14 NOT PY>2000  
S16 16 RD (unique items)  
S17 27412 (BENEFIT OR BENEFITS OR ASSET OR ASSETS OR INVESTMENT? OR -  
PORTFOLIO? OR STOCK OR STOCKS OR EQUITY OR EQUITIES OR BOND OR  
BONDS) (S) (S3 OR S4)  
S18 71 S17(5N) (S5 OR S6)  
S19 55 RD (unique items)  
S20 33 S19 NOT CONVERTIBLE?  
S21 21 S20 NOT PY>2000  
S22 300 S7(3N) S9  
S23 300 S22 NOT (S11 OR S16 OR S19)  
S24 189 S23 NOT PY>2000  
S25 111 S24 NOT CONVERTIBLE?  
S26 71 RD (unique items)  
S27 23 S26 NOT TRANSFER?  
S28 0 - S8(S) S9